Murray Darling & Swan Hill

Wine Grape Crush Report
2018 Vintage

Murray Valley Winegrowers Inc

Wine Australia

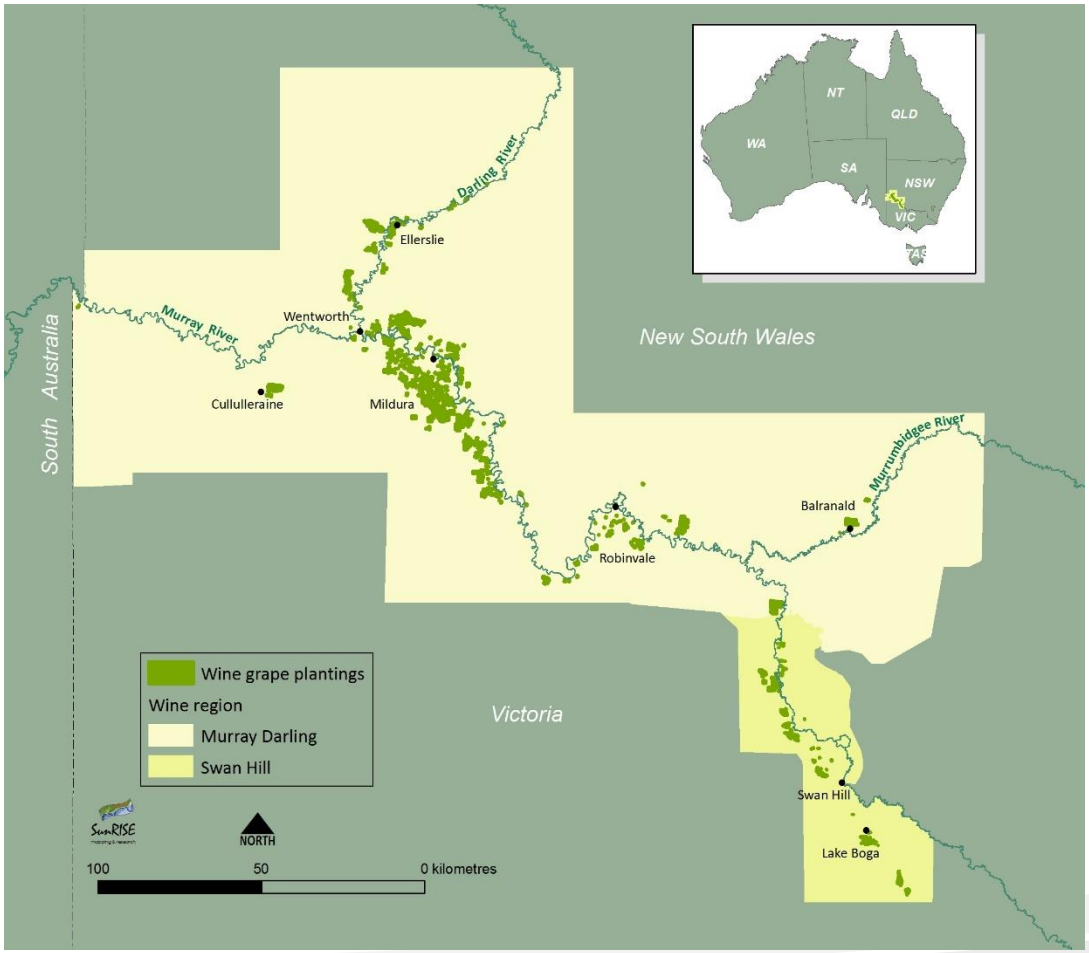
Murray Valley Winegrape Industry Development Committee

iDC

Table of Contents

- Murray Darling & Swan Hill GI wine regions 3
- Survey data methodology and definitions 4
- **Section 1: Summary Data & Yearly Trends** 5
- Overview of vintage statistics 2018 6
- Vintage summary 2018 vs 2017 7
- Historical trends in production – winery-grown vs purchased fruit 2004-2018 8
- Historical crush from the Murray Darling & Swan Hill regions 2004-2018 9
- Total purchased tonnes 2018 - white varieties 10
- Total winery-grown tonnes 2018 - white varieties 11
- Top ten purchased vs. winery-grown tonnes 2018 - white varieties 12
- Total purchased tonnes 2018 - red varieties 13
- Total winery-grown tonnes 2018 - red varieties 14
- Top ten purchased vs. winery-grown tonnes 2018 - red varieties 15
- **Section 2: Wine Grape Value and Tonnage Data 2018** 16
- Intake and price summary data by variety 2018 – white varieties 17
- Comparison between average price per tonne 2017 to 2018 – white varieties 18
- Intake and price summary data by variety 2018 – red varieties 19
- Comparison between average price per tonne 2017 to 2018 – red varieties 20
- Price dispersion 2018 – red varieties 21
- Price dispersion 2018 – white varieties 22
- **Section 3: Survey respondents** 23
- List of wineries that reported crushing grapes from Murray Darling & Swan Hill in 2018 24

Murray Darling & Swan Hill GI wine regions



Survey data methodology and definitions

INTRODUCTION

The Murray Darling & Swan Hill Wine Grape Crush Report is produced by Wine Australia for Murray Valley Winegrowers (MVW). Data has been drawn from the National Vintage survey of all wineries, conducted by Wine Australia.

DATA QUALITY

The 2018 Murray Valley vintage survey was conducted by Wine Australia as part of the National Vintage Survey.

All data provided by the wineries has been aggregated. Under an agreement with wineries covering the provision of data, disaggregation is not permitted. It is not possible to provide data from individual wineries.

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DEFINITIONS

Total 2018 tonnes: The total tonnes of grapes purchased in the Murray Darling & Swan Hill regions and processed either in these regions or elsewhere. All wineries in Australia known to source fruit from Murray Darling/ Swan Hill vineyards were included in the survey collection process. It is estimated that the non-response rate nationally is 15%; however, a specific non-response rate for Murray Darling & Swan Hill cannot be determined.

Purchased Grapes: The total tonnes of grapes purchased from independent grape growers.

Winery Grown Grapes: The total tonnes harvested from winery-owned vineyards.

Tonnes Purchased as a Percentage of Total: This statistic is calculated by dividing the tonnes purchased from growers by the total tonnes crushed. It indicates the proportion of grapes purchased from independent growers.

Total Value of Purchased Grapes: Total value of each individual batch purchased has been provided by the winery.

Average Purchase Price: An average purchase cost per tonne for each variety is calculated by dividing the total value of purchased grapes by the total tonnes of purchased grapes.

Total Value of Winery Grown Grapes: Winery Grown value is estimated using the average value per variety of purchased grapes multiplied by the reported winery-grown tonnes. Where no purchase value exists for a variety, the average across similar regions is used, or if that is not available then the average for varieties of that colour in Murray Darling & Swan Hill is used.

Total Value of All Grapes: The sum of the Total Purchase Value of fruit from independent growers and the Total Value of winery-grown grapes.

NOTE: rounding of numbers in tables may lead to small discrepancies in totals.

Section 1: Summary Data and Yearly Trends

Overview of vintage statistics 2018

The total wine grape harvest from the Murray Darling & Swan Hill regions in 2018 was 345,458 tonnes, 8% less than the 359,613 tonnes harvested in 2017. Of the 345,458 tonnes, 242,276 tonnes were purchased from independent growers and 103,183 tonnes were harvested and crushed by wineries from their own vineyards.

The crush of purchased fruit was down by 5% while the crush from winery-owned vineyards was down by 2% (see page 7). This may reflect changes in vineyard ownership, business practices and/or the respondent group. The proportion of winery-owned fruit increased from 29% in 2017 to 30%.

Most of the decrease came from red varieties, which were down overall by 8%, while the white crush was only down by 1%. This was a result of Chardonnay increasing by 18% while most other varieties declined.

While tonnages were down, the prices paid for most varieties increased. Overall, the average purchase price for the regions increased by 13% from $357 to $402 per tonne. The average price of red varieties increased the most, with reds up by 21% from $392 to $474 per tonne while whites increased by 5% from $328 to $344 per tonne (pages 17 and 19). This trend reflects the continuing strong demand for red wine in export markets, particularly China, as well as the greater reduction in tonnes for reds. Shiraz was up by $88 to $483 per tonne and Cabernet Sauvignon was up by $81 to $483 per tonne. Chardonnay increased by $23 to $333 and Sauvignon Blanc by $8 to $406 per tonne (see pages 18 and 20).

The combination of higher prices and the lower crush saw the total value of 2018 wine grapes purchased from independent growers in Murray Darling-Swan Hill increase by 7% or $6 million from $91 million in 2017 to $97 million.

- Total crush was down by 8% to 345,458 tonnes compared with 359,613 tonnes in 2017
- Total crush has reduced for five consecutive years after setting a record in 2013
- Purchased tonnes comprised 70% of the total crush and winery-grown fruit 30%
- Winery-grown share of crush has tripled since 2004
- Top three whites: Chardonnay, Pinot Gris and Sauvignon Blanc accounted for 75% of the total white crush
- Top three reds: Shiraz, Cabernet Sauvignon and Merlot accounted for 88% of the total red crush
- Value of the total crush was up by $6 million (7%)
- White varieties made up 57% by volume and 50% by value of the total crush
- Overall average price increased from $357 to $402 per tonne
- Average prices for major varieties generally increased with prices for red varieties up by more than for whites.

Vintage summary 2018 vs 2017

2018 Vintage

	Total Winery Grown Tonnes	Total Purchased Tonnes	Total Crushed Tonnes	Total value of Purchased Fruit	Total Value of Crush	Colour Percentage of Total Value	Colour Percentage of Total Crush	Tonnes purchased as a % of total	Value purchased as % of Total value
Red	39,565	108,041	147,606	$51,203,899	$69,635,064	50%	43%	73%	74%
White	63,618	134,235	197,853	$46,151,117	$69,892,850	50%	57%	68%	66%
Total Crush	103,183	242,276	345,458	$97,355,016	$139,527,914	100%	100%	70%	70%

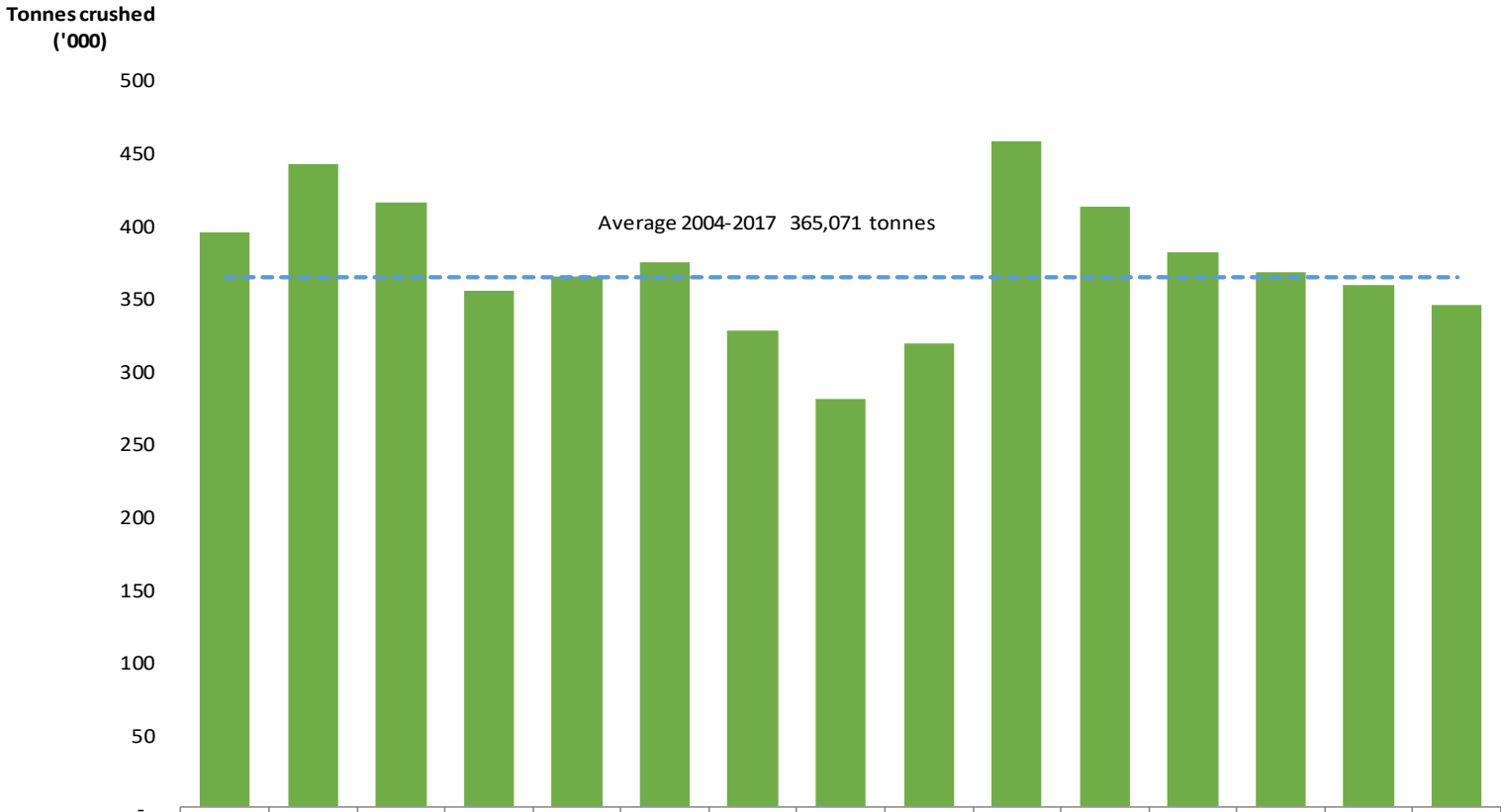
2017 Vintage

	Total Winery Grown Tonnes	Total Purchased Tonnes	Total Crushed Tonnes	Total value of Purchased Fruit	Total Value of Crush	Colour Percentage of Total Value	Colour Percentage of Total Crush	Tonnes purchased as a % of total	Value purchased as % of Total value
Red	44,631	115,394	160,025	$45,281,824	$62,664,306	48%	44%	72%	72%
White	60,823	138,766	199,589	$45,461,844	$67,216,396	52%	56%	70%	68%
Total Crush	105,454	254,160	359,613	$90,743,668	$129,880,702	100%	100%	71%	70%

Historical trends in production – winery grown vs purchased fruit 2004-2018

	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Purchased	357,425	399,282	361,614	303,389	316,211	307,323	268,147	225,806	272,781	373,900	330,387	285,402	237,678	254,160	242,276
Winery Grown	38,626	43,347	54,323	52,000	49,000	68,000	60,000	55,000	46,757	84,714	83,240	96,330	130,419	105,454	103,183

Historical crush from the Murray Darling & Swan Hill regions 2004-2018

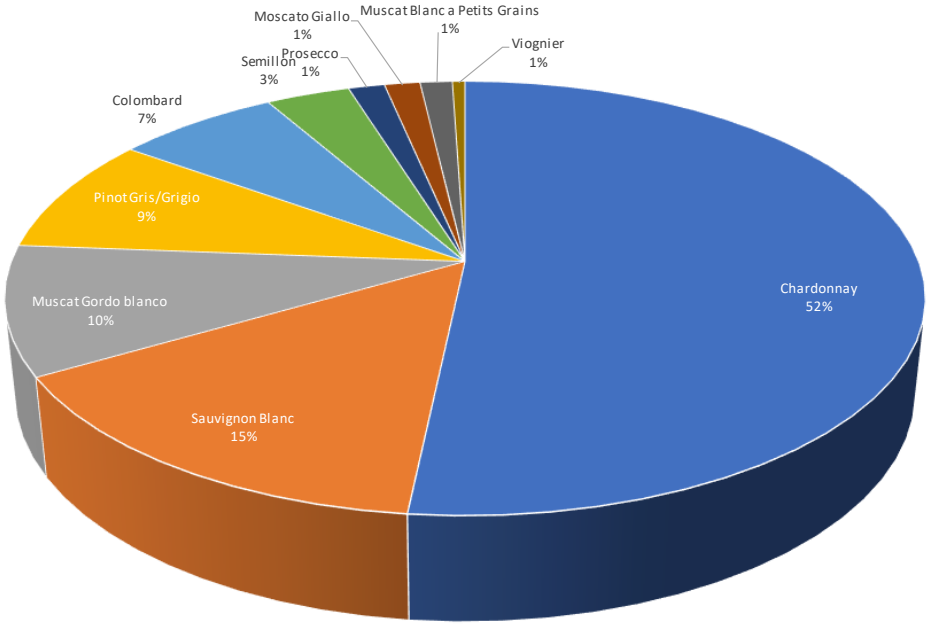


	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018
Total crush	396,051	442,629	415,937	355,389	365,211	375,323	328,147	280,806	319,538	458,614	413,627	381,732	368,097	359,614	345,458
Average	365,071	365,071	365,071	365,071	365,071	365,071	365,071	365,071	365,071	365,071	365,071	365,071	365,071	365,071	365,071

Total purchased tonnes 2018 – white varieties

Whites (top 10)	Purchased (tonnes)
Chardonnay	68,540
Sauvignon Blanc	19,795
Muscat Gordo blanco	12,756
Pinot Gris/Grigio	11,546
Colombard	8,979
Semillon	4,603
Prosecco	1,991
Moscato Giallo	1,947
Muscat Blanc a Petits Grains	1,771
Viognier	690
TOTAL Whites	**134,235**

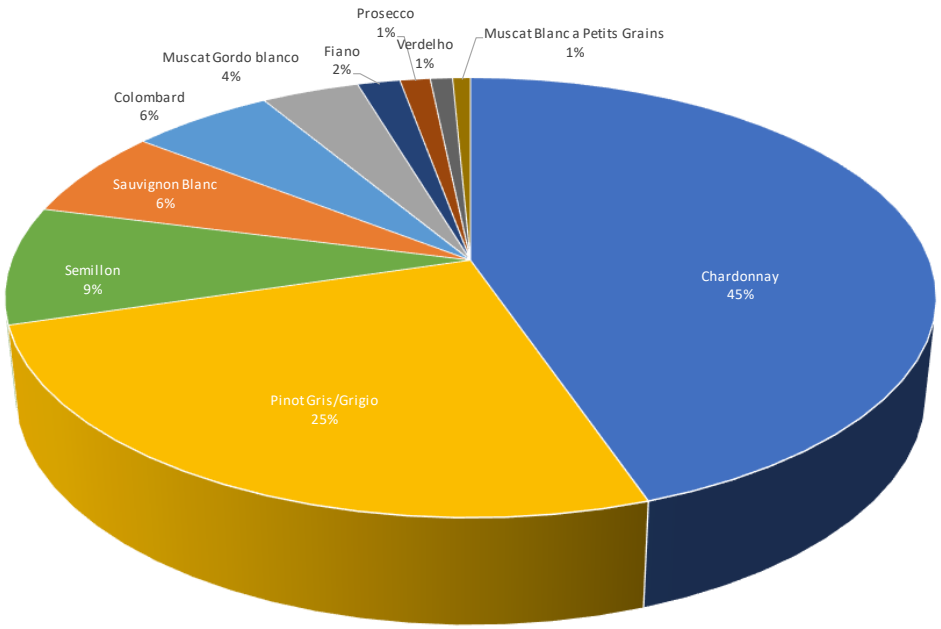
Other whites summary	Purchased (tonnes)
Crouchen	359
Riesling	272
Vermentino	213
Sultana	197
Chenin blanc	186
Gewurztraminer	130
Sun Muscat	121
Fiano	69
Other white	69



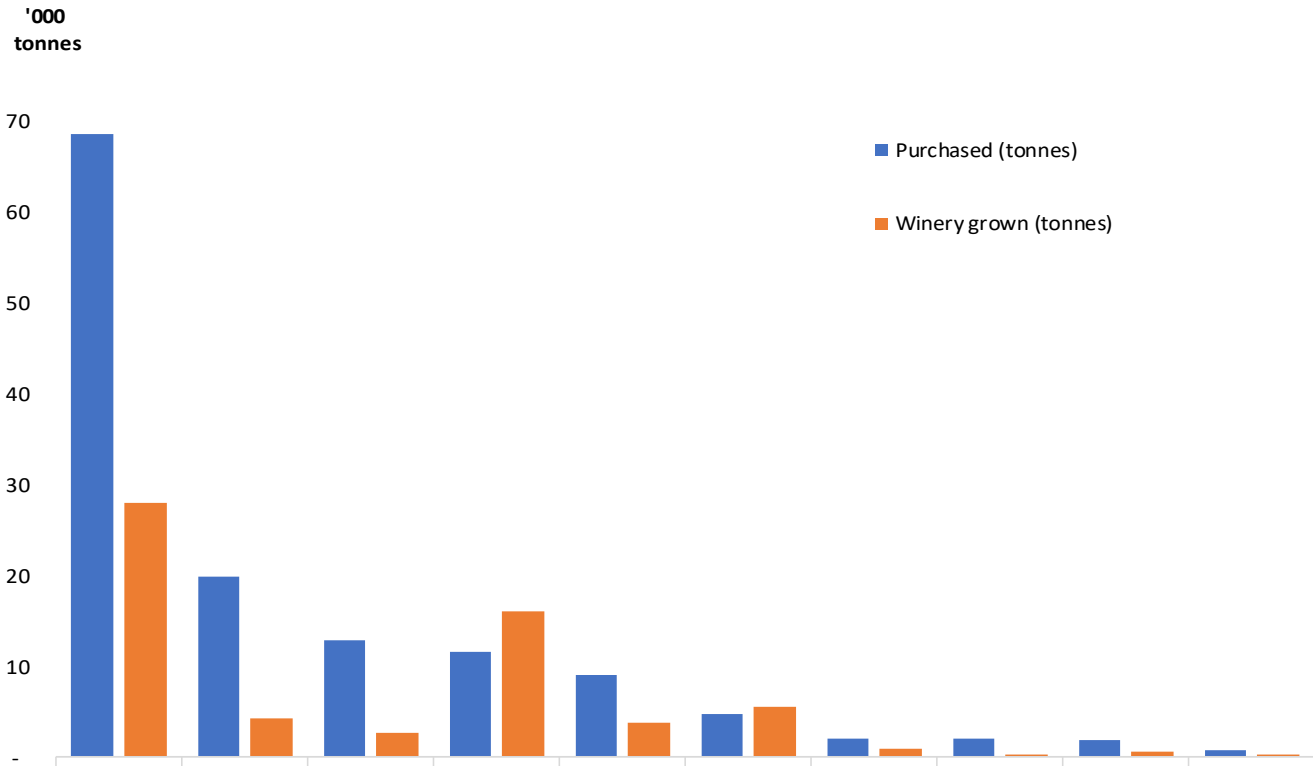
Total winery-grown tonnes 2018 – white varieties

Whites (top 10)	Winery grown (tonnes)
Chardonnay	27,971
Pinot Gris/Grigio	16,005
Semillon	5,424
Sauvignon Blanc	4,088
Colombard	3,659
Muscat Gordo blanco	2,497
Fiano	1,090
Prosecco	772
Verdelho	571
Muscat Blanc a Petits Grair	456
TOTAL Whites	**63,618**

Other whites summary	Winery grown (tonnes)
Vermentino	383
Riesling	237
Viognier	228
Diamond Muscat	99
Moscato Giallo	85
Canada Muscat	29
Verdejo	15
Inzolia	2
Pecorino	2
Falanghina	1
Grechetto	1
Ribolla Gialla	1
Verdicchio	1
Arneis	1



Top ten purchased white varieties 2018 – comparison with winery-grown tonnes

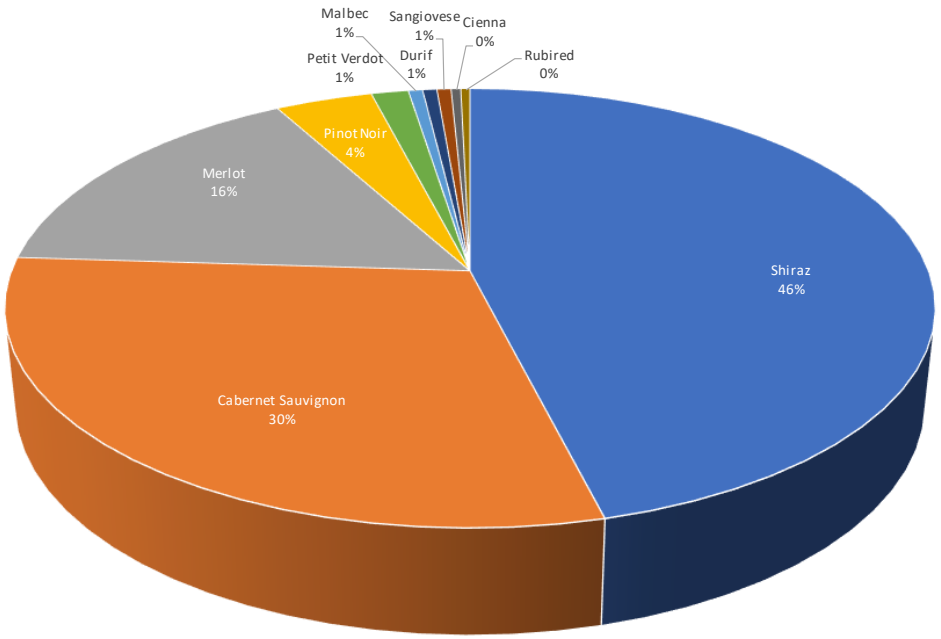


	Chardonnay	Sauvignon Blanc	Muscat Gordo blanco	Pinot Gris/Grigio	Colombard	Semillon	Prosecco	Moscato Giallo	Muscat Blanc a Petits Grains	Viognier
Purchased (tonnes)	68,540	19,795	12,756	11,546	8,979	4,603	1,991	1,947	1,771	690
Winery grown (tonnes)	27,971	4,088	2,497	16,005	3,659	5,424	772	85	456	228

Total purchased tonnes 2018 – red varieties

Reds (top 10)	Purchased (tonnes)
Shiraz	48,871
Cabernet Sauvignon	31,797
Merlot	16,951
Pinot Noir	4,222
Petit Verdot	1,617
Malbec	618
Durif	618
Sangiovese	615
Cienna	420
Rubired	398
TOTAL Reds	**108,041**

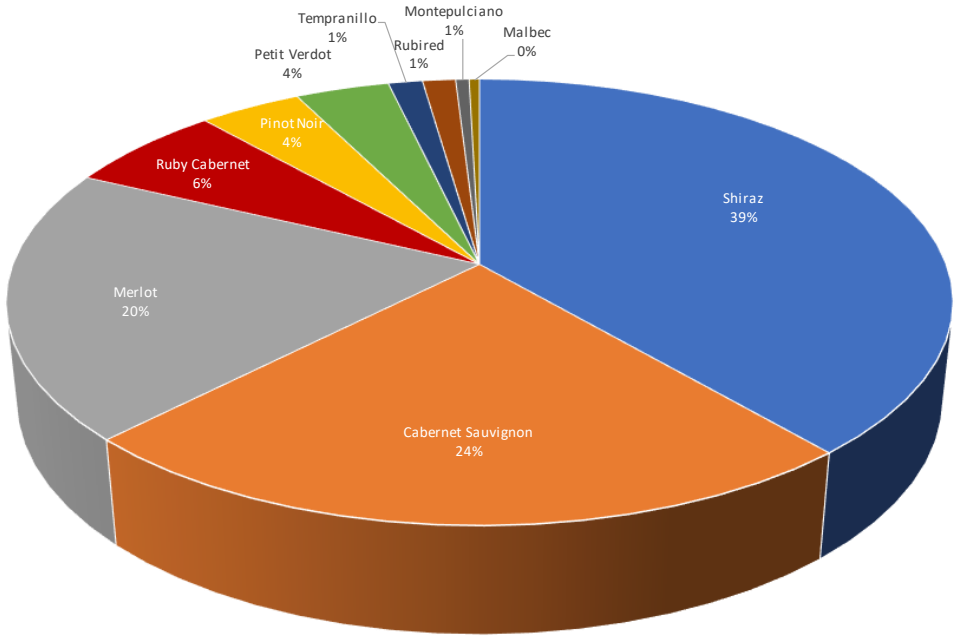
Other reds summary	Purchased (tonnes)
Lambrusco	376
Tempranillo	329
Grenache	310
Muscat Rouge a Petits Grains	223
Black Muscat	171
Dolcetto	157
Ruby Cabernet	128
Mataro/Mourvedre	95
Other red	46
Sagrantino	42
Flora	25
Tannat	12



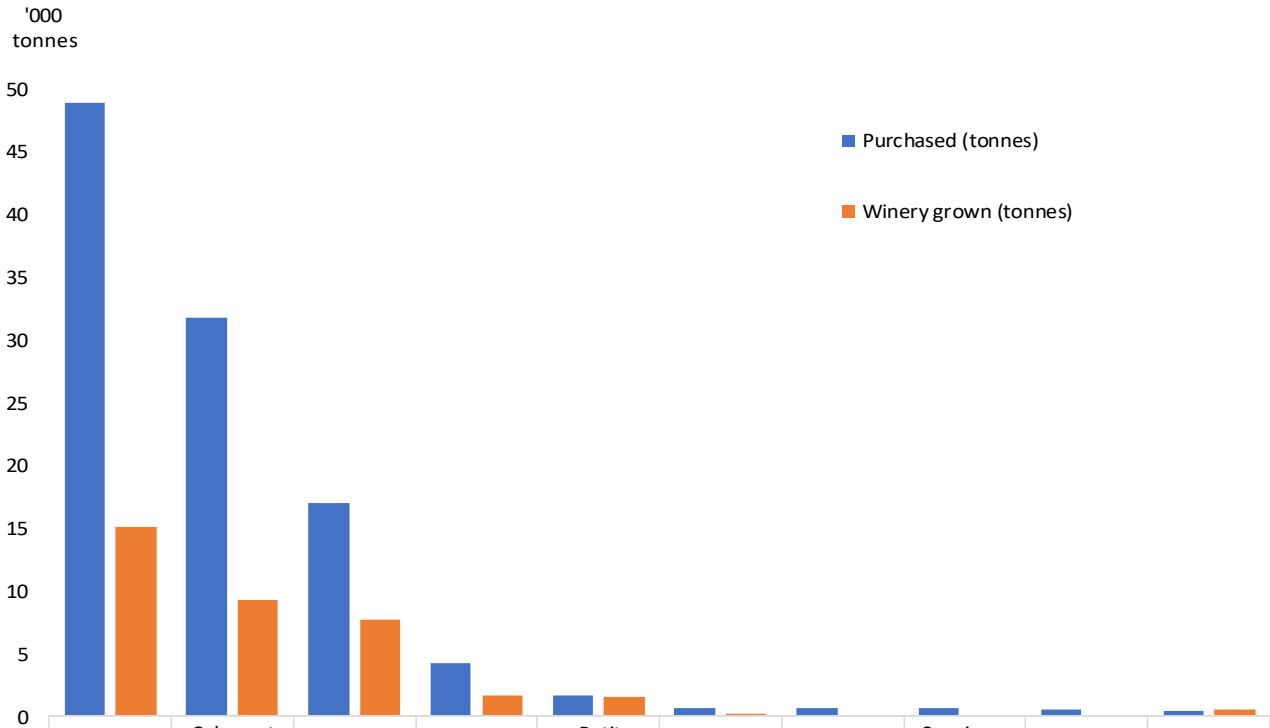
Total winery-grown tonnes 2018 – red varieties

Reds (top 10)	Winery grown (tonnes)
Shiraz	15,028
Cabernet Sauvignon	9,205
Merlot	7,642
Ruby Cabernet	2,480
Pinot Noir	1,598
Petit Verdot	1,467
Tempranillo	534
Rubired	516
Montepulciano	210
Malbec	161
TOTAL Reds	**39,564**

Other reds summary	Winery grown (tonnes)
Nero d'Avola	153
Sagrantino	147
Grenache	139
Lambrusco	119
Mataro/Mourvedre	83
Zweigelt	39
Nebbiolo	22
Saperavi	11
Tannat	6
Uva di Troia	2
Piedirosso	1
Dolcetto	1



Top ten purchased red varieties 2018 – comparison with winery-grown tonnes



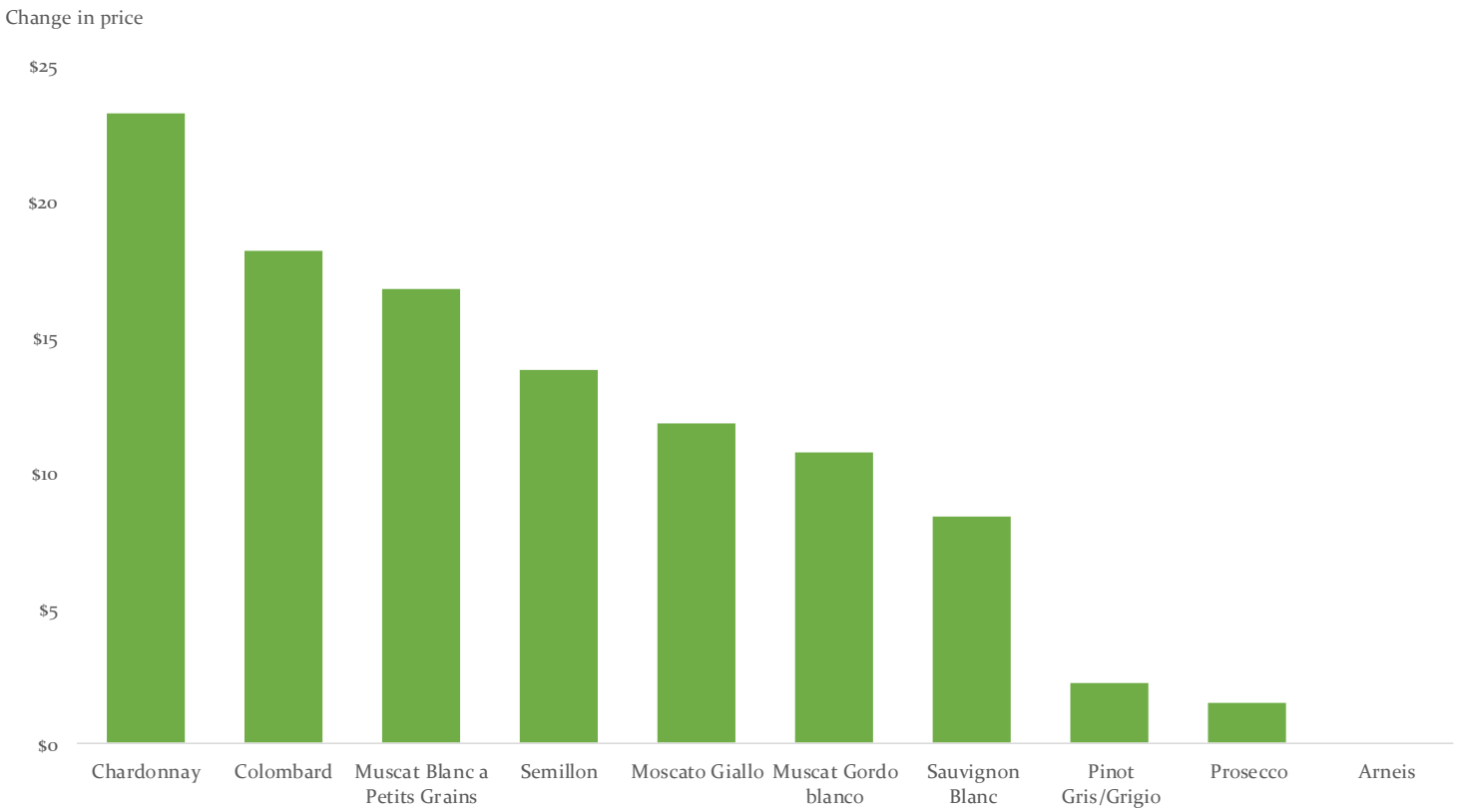
	Shiraz	Cabernet Sauvignon	Merlot	Pinot Noir	Petit Verdot	Malbec	Durif	Sangiovese	Cienna	Rubired
Purchased (tonnes)	48,871	31,797	16,951	4,222	1,617	618	618	615	420	398
Winery grown (tonnes)	15,028	9,205	7,642	1,598	1,467	161	-	-	-	516

Section 2: Wine Grape Value and Tonnage Data 2018

Intake and price summary data by variety 2018 – white varieties

	Purchased Grape Summary			Winery	2018 Total			2017 Summary		
Variety	Purchased Tonnes	Value of Fruit Purchased	Average Purchase Price	Winery Grown Tonnes	Total Tonnes	Total Value	Tonnes as % of Total Whites	Average Purchase Price	Total Tonnes	Tonnes as % of Total Whites
Arneis				1	1	126	0%		0.606	0%
Canada Muscat				29	29	13,221	0%		26	0%
Chardonnay	68,540	$22,817,979.22	$333	27,971	96,511	32,129,776	49%	$310	81,487	41%
Chenin blanc	186	$43,545.60			186	43,546	0%		255	0%
Colombard	8,979	$2,304,884.65	$257	3,659	12,638	3,244,034	6%	$238	16,820	8%
Crouchen	359	$82,514.80			359	82,515	0%		398	0%
Diamond Muscat				99	99	34,037	0%			0%
Falanghina				1	1	457	0%			0%
Fiano	69	$33,180.90		1,090	1,159	559,000	1%		2,115	1%
Garganega						0	0%		0	0%
Gewurztraminer	130	$55,105.50			130	55,106	0%		171	0%
Grechetto				1	1	370	0%			0%
Greco						0	0%		1	0%
Inzolia				2	2	810	0%			0%
Moscato Giallo	1,947	$563,228.60	$289	85	2,033	587,823	1%	$277	2,268	1%
Muscadelle (Tokay)						0	0%		12	0%
Muscat Blanc a Petits Grains	1,771	$555,976.70	$314	456	2,226	699,000	1%	$297	2,479	1%
Muscat Gordo blanco	12,756	$3,061,399.15	$240	2,497	15,253	3,660,774	8%	$229	19,613	10%
Other white	69	$25,743.75			69	25,744	0%		184	0%
Pecorino				2	2	744	0%			0%
Pinot Gris/Grigio	11,546	$5,854,200.34	$507	16,005	27,551	13,969,233	14%	$505	27,347	14%
Prosecco	1,991	$958,801.24	$482	772	2,763	1,330,472	1%	$480	2,924	1%
Ribolla Gialla				1	1	350	0%			0%
Riesling	272	$111,316.10		237	509	208,414	0%	$450	536	0%
Sauvignon Blanc	19,795	$8,038,207.73	$406	4,088	23,883	9,698,103	12%	$398	28,191	14%
Semillon	4,603	$1,229,333.11	$267	5,424	10,027	2,677,780	5%	$253	11,848	6%
Sultana	197	$44,433.00			197	44,433	0%		295	0%
Sun Muscat	121	$49,989.92			121	49,990	0%		83	0%
Verdejo				15	15	5,953	0%		95	0%
Verdelho				571	571	194,993	0%		263	0%
Verdicchio				1	1	248	0%			0%
Vermentino	213	$100,916.00		383	596	282,530	0%		850	0%
Viognier	690	$220,361.00	$319	228	918	293,273	0%	$341	1,328	1%
White Total	**134,235**	**$46,151,117.32**	**$344**	**63,618**	**197,853**	**69,892,850**	**100%**	**$328**	**199,589**	**100%**

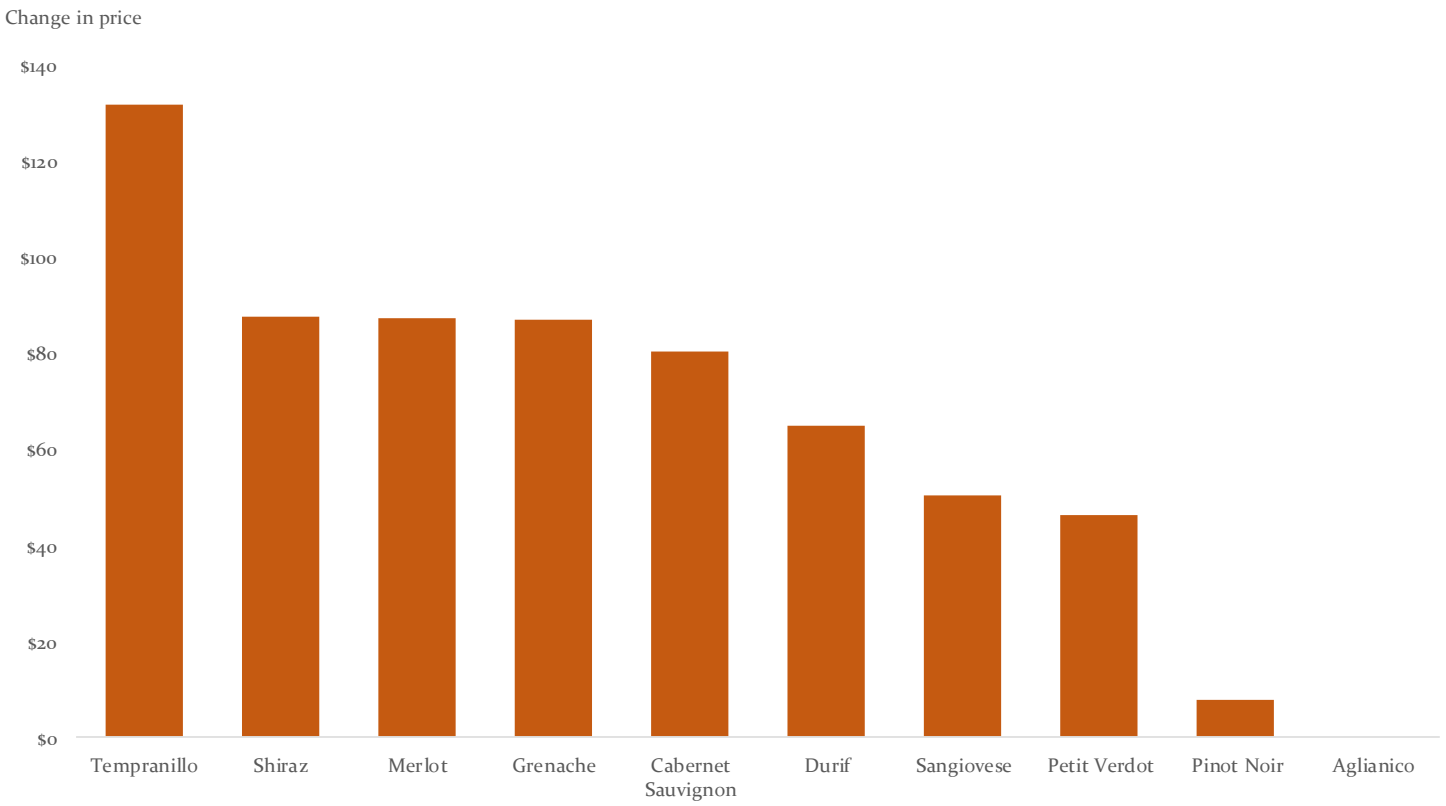
Change in average price per tonne 2017 to 2018 – white varieties



Intake and price summary data by variety 2018 – red varieties

	Purchased Grape Summary			Winery	2018 Total			2017 Summary		
Variety	Purchased Tonnes	Value of Fruit Purchased	Average Purchase Price	Winery Grown Tonnes	Total Tonnes	Estimated Total Value	Tonnes as % of Total Reds	Average Purchase Price	Total Tonnes	Tonnes as % of Total Reds
Aglianico				0	0	16	0%			0%
Barbera						0	0%		0	0%
Black Muscat	171	$119,574.00			171	119,574	0%		177	0%
Cabernet Sauvignon	31,797	$15,363,809.03	$483	9,205	41,001	19,811,328	28%	$403	42,493	27%
Cienna	420	$146,853.00			420	146,853	0%			0%
Colorino						0	0%		0	0%
Dolcetto	157	$47,854.50		1	158	48,057	0%		219	0%
Durif	618	$367,547.00	$595		618	367,547	0%	$530	432	0%
Flora	25	$5,535.20			25	5,535	0%		22	0%
Graciano				0	0	200	0%			0%
Grenache	310	$139,141.00	$449	139	449	201,283	0%	$362	457	0%
Lambrusco	376	$282,247.50		119	496	371,828	0%		330	0%
Malbec	618	$331,875.31		161	779	418,448	1%		966	1%
Mammolo				0	0	0	0%		0	0%
Marzemino				0	0	0	0%		0	0%
Mataro/Mourvedre	95	$35,168.50		83	178	65,827	0%		297	0%
Merlot	16,951	$7,669,427.15	$452	7,642	24,593	11,126,946	17%	$365	30,462	19%
Montepulciano				210	210	142,123	0%		165	0%
Muscat Rouge a Petits Grains	223	$112,200.70			223	112,201	0%		278	0%
Nebbiolo				22	22	7,988	0%		23	0%
Nero d'Avola				153	153	72,468	0%		276	0%
Other red	46	$17,280.00			46	17,280	0%		52	0%
Petit Verdot	1,617	$649,420.32	$402	1,467	3,084	1,238,434	2%	$355	3,774	2%
Piedirosso				1	1	592	0%			0%
Pinot Noir	4,222	$1,692,433.13	$401	1,598	5,820	2,333,046	4%	$393	6,565	4%
Rubired	398	$140,660.08		516	914	323,324	1%		1,488	1%
Ruby Cabernet	128	$50,725.00		2,480	2,608	1,037,511	2%	$359	2,473	2%
Sagrantino	42	$27,535.20		147	189	124,791	0%		136	0%
Sangiovese	615	$247,913.20	$403	0	615	247,991	0%	$353	1,077	1%
Saperavi				11	11	10,627	0%		9	0%
Schioppettino				0	0	85	0%			0%
Shiraz	48,871	$23,598,594.52	$483	15,028	63,899	30,855,255	43%	$395	65,953	41%
Tannat	12	$5,683.20		6	18	8,645	0%		31	0%
Tempranillo	329	$152,421.60	$463	534	863	399,816	1%	$331	1,861	1%
Teroldego				0	0	106	0%			0%
Uva di Troia				2	2	952	0%			0%
Zweigelt				39	39	18,389	0%		9	0%
Red Total	**108,041**	**$51,203,899.13**	**$474**	**39,565**	**147,606**	**69,635,064**	**100%**	**$392**	**160,025**	**100%**

Change in average price per tonne 2017 to 2018 – red varieties



Price dispersion 2018 – red varieties

		Price dispersion - number of tonnes in each price range											
	Tonnes purchased	< $300	$300 to <$600	$600 to <$1500	$1500 to <$2000	$2000+	Total value purchased	Cal avg. purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
Red													
Cabernet Sauvignon	31,797		30,263	1,534			$15,363,809	$483	20%	9,205	22%	41,001	$19,811,328
Cienna	420		420								0%	420	$146,853
Dolcetto	157		157							1	0%	158	$48,057
Durif	618		85	533			$367,547	$595	12%		0%	618	$367,547
Grenache	310		310				$139,141	$449	24%	139	31%	449	$201,283
Malbec	618		618							161	21%	779	$418,448
Mataro/Mourvedre	95		95							83	47%	178	$65,827
Merlot	16,951		16,909	42			$7,669,427	$452	24%	7,642	31%	24,593	$11,126,946
Montepulciano										210	100%	210	$142,123
Muscat Rouge a Petits Grains	223		206	17							0%	223	$112,201
Nero d'Avola										153	100%	153	$72,468
Petit Verdot	1,617		1,617				$649,420	$402	13%	1,467	48%	3,084	$1,238,434
Pinot Noir	4,222		4,222				$1,692,433	$401	2%	1,598	27%	5,820	$2,333,046
Ruby Cabernet	128		128							2,480	95%	2,608	$1,037,511
Sangiovese	615		615				$247,913	$403	14%	0	0%	615	$247,991
Shiraz	48,871		47,529	1,342			$23,598,595	$483	22%	15,028	24%	63,899	$30,855,255
Tempranillo	329		243	86			$152,422	$463	40%	534	62%	863	$399,816
Other red	1,069	25	455	589			$598,515	$560	7%	864	45%	1,934	$1,009,931
Red total	**108,041**	**25**	**103,874**	**4,142**			**$51,203,899**	**$474**	**21%**	**39,565**	**27%**	**147,606**	**$69,635,064**

Where fewer than three wineries have reported a variety, the average purchase value is not displayed to protect confidentiality.

Price dispersion 2018 – white varieties

		Price dispersion - number of tonnes in each price range											
	Tonnes purchased	< $300	$300 to <$600	$600 to <$1500	$1500 to <$2000	$2000+	Total value purchased	Cal avg. purch. value per tonne	Change in price YoY	Winery grown fruit	Share of winery grown	Total crushed	Est total value ALL grapes
White													
Canada Muscat										29	100%	29	$13,221
Chardonnay	68,540	1,296	65,634	1,611			$22,817,979	$333	8%	27,971	29%	96,511	$32,129,776
Chenin blanc	186	186									0%	186	$43,546
Colombard	8,979	8,294	685				$2,304,885	$257	8%	3,659	29%	12,638	$3,244,034
Fiano	69		65	3						1,090	94%	1,159	$559,000
Gewurztraminer	130		130								0%	130	$55,106
Moscato Giallo	1,947	1,147	801				$563,229	$289	4%	85	4%	2,033	$587,823
Muscat Blanc a Petits Grains	1,771	74	1,686	10			$555,977	$314	6%	456	20%	2,226	$699,000
Muscat Gordo Blanco	12,756	11,614	1,141				$3,061,399	$240	5%	2,497	16%	15,253	$3,660,774
Pinot Gris/Grigio	11,546		11,432	114			$5,854,200	$507	0%	16,005	58%	27,551	$13,969,233
Prosecco	1,991		1,991				$958,801	$482	0%	772	28%	2,763	$1,330,472
Riesling	272		272							237	47%	509	$208,414
Sauvignon Blanc	19,795		19,795				$8,038,208	$406	2%	4,088	17%	23,883	$9,698,103
Semillon	4,603	3,884	719				$1,229,333	$267	5%	5,424	54%	10,027	$2,677,780
Sultana	197	197									0%	197	$44,433
Verdelho										571	100%	571	$194,993
Vermentino	213		163	50						383	64%	596	$282,530
Viognier	690		690				$220,361	$319	-6%	228	25%	918	$293,273
Other white	549	359	190							123	18%	672	$201,342
White total	**134,235**	**27,053**	**105,393**	**1,789**			**$46,151,117**	**$344**	**5%**	**63,618**	**32%**	**197,853**	**$69,892,850**
Grand total	**242,276**	**27,078**	**209,267**	**5,931**			**$97,355,016**	**$402**	**13%**	**103,183**	**30%**	**345,458**	**$139,527,914**

Where fewer than three wineries have reported a variety, the average purchase value is not displayed to protect confidentiality.

Section 3: Survey respondents

Thank you to the following wineries that reported crushing grapes from Murray Darling & Swan Hill in 2018

Accolade Wines	Idyll Wine Co
Alex Russell Wines	Kingston Estate Wines
Andrew Peace Wines	Limestone Coast Wines
Australian Vintage	Pernod Ricard Winemakers
Austwine Viticulture	Pfeiffer Wines
Berton Vineyards	Qualia Wine Services
Best's Wines	Rathbone Wine Group
Brown Brothers	Symphony Hill Wines
Callipari	Tahbilk
Cape Jaffa	The Wine Group
Casella Wines	Treasury Wine Estates
Chalmers Wines	Trentham Estate
De Bortoli Wines	Weilong Wine Company
Duxton Capital Australia	Wingara Wine Group
Gapsted Wines	Zilzie Wines